



Health Consumer
Powerhouse

Euro Health Consumer Index 2014

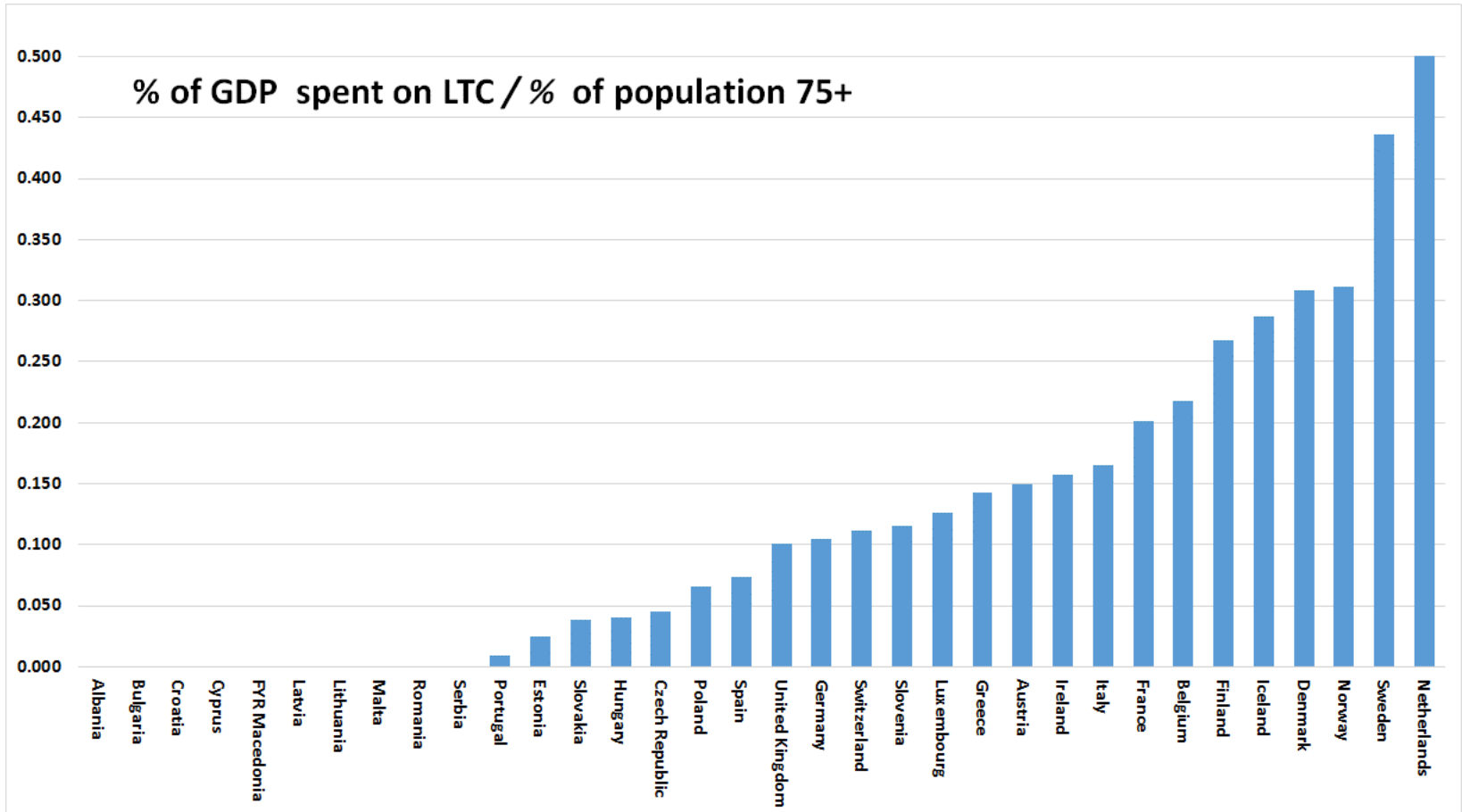
Brussels, January 27, 2015

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**“Health System Performance
Assessment: reconciling the
measurable with the
meaningful”**

Dr. Vytenis Andriukaitis,
EU Health commissioner

The aging challenge



A gigantic problem, or a fantastic sign of success for modern healthcare?



About Health Consumer Powerhouse

- ✔ Comparing healthcare systems performance in 35 countries from a consumer/patient view.
- ✔ Since 2004, more than 40 index editions, available for free.
- ✔ Index projects financed through unconditional development grants, similar to medical faculty sponsored research.

Europe

✔ Euro Health Consumer Index	2005, 2006, 2007, 2008, 2009, 2012, 2013
✔ Euro Consumer Heart Index	2008
✔ Euro Diabetes Care Index	2008, 2014
✔ Euro HIV Index	2009
✔ Euro Patient Empowerment Index	2009
✔ Nordic COPD Index	2010
✔ Tobacco Harm Prevention Index	2011
✔ Euro Headache Index	2011
✔ Euro Hepatitis Index	2012
✔ Euro Vision Scorecard	2013
✔ Euro Pancreatic Cancer Index	2014

Sweden, others

✔ Health Consumer Index	Sweden 2004, 2005, 2006
✔ Diabetes Care Index	Sweden 2006, 2007, 2008
✔ Breast Cancer Index	Sweden 2006
✔ Vaccination Index	Sweden 2007, 2008
✔ Renal Care Index	Sweden 2007, 2008
✔ Smoke Cessation Index	Sweden 2008
✔ COPD Index	Sweden 2009, Nordic 2010
✔ Advanced Home Care Index	Sweden 2010
✔ Euro-Canada Health Consumer Index	Canada 2008, 2009
✔ Provincial Health Consumer Index	Canada 2008, 2009, 2010
✔ All Hospitals Index	Sweden 2011



EHCI 2014

Important trends

- ✔ **Treatment results in European healthcare keep improving essentially everywhere!**
- ✔ **Wealthy countries do better in the EHCI – the “equity gap” more obvious than in previous years**
- ✔ **Savings on pharmaceuticals the most obvious effect of austerity**
- ✔ **Some patterns remarkably stable over time – waiting lists a mental condition?**
- ✔ **“Big Beveridge” have problems delivering!**



Sub-discipline	Indicator	Albania	Austria	Belgium	Bosnia Herzegovina	Bulgaria	Croatia	Cyprus	Czech Republic	Denmark	Estonia	Finland	France	FYR Macedonia
1. Patient rights and information	1.1 Healthcare law based on Patients' Rights				n.a.									
	1.2 Patient organisation involvement				n.a.									
	1.3 No-fault malpractice insurance				n.a.									
	1.4 Right to second opinion				n.a.									
	1.5 Access to own medical record				n.a.									
	1.6 Registry of <i>bona fide</i> doctors				n.a.									
	1.7 Web or 24/7 telephone HC info				n.a.									
	1.8 Cross-border care seeking freely allowed	n.ap.			n.ap.									n.ap.
	1.9 Provider catalogue with quality ranking				n.a.									
	1.10 EPR penetration				n.a.									
	1.11 On-line booking of appointments?				n.a.									
	1.12 e-prescriptions				n.a.									
Subdiscipline weighted score		92	125	100	54	79	104	83	100	142	121	133	117	138
2. Accessibility (waiting times for treatment)	2.1 Family doctor same day access				n.a.									
	2.2 Direct access to specialist				n.a.									
	2.3 Major elective surgery <90 days				n.a.									
	2.4 Cancer therapy < 21 days				n.a.									
	2.5 CT scan < 7days				n.a.									
	2.6 A&E waiting times				n.a.									
	Subdiscipline weighted score		200	200	225	75	163	163	150	175	200	150	175	175



EHCI 2014 sub-disciplines

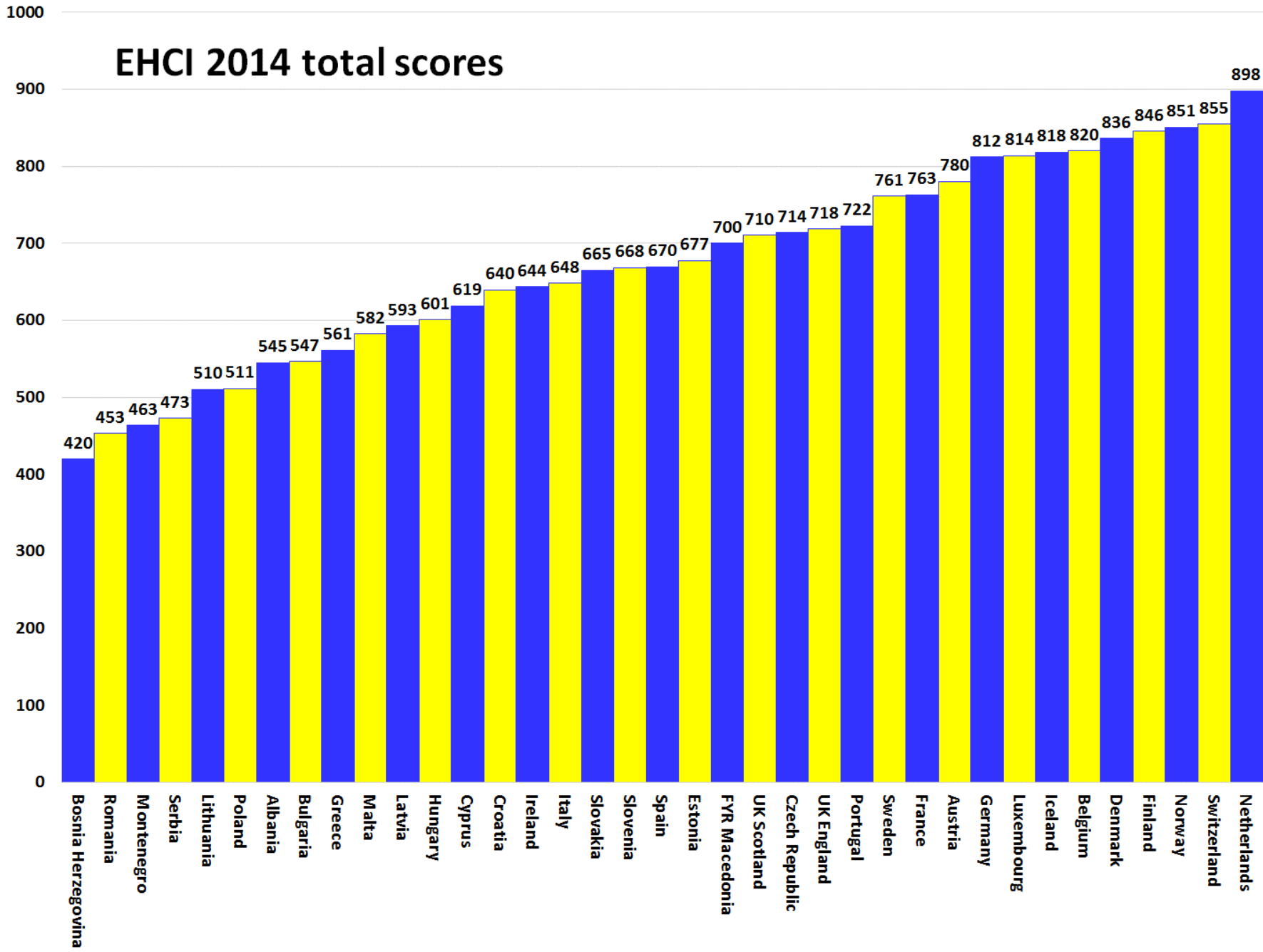
Sub-discipline	Weight (points out of 1000 for full score)	Doing well
Patient rights, information and e-Health	150	Netherlands, Denmark, Norway, FYR Macedonia, Iceland
Waiting times / Access	225	Belgium, Switzerland, FYR Macedonia
Outcomes	250	Netherlands, Norway, Iceland, Switzerland, Germany
Range & Reach of services provided	150	Netherlands, Sweden, Norway, Belgium, Finland
Prevention	125	Iceland, Norway, Spain, Sweden
Pharmaceuticals deployment	100	Finland, Germany, Ireland, Netherlands, UK

A total of 48 indicators in six sub-disciplines

And we have really tried to be inventive and make the Index more challenging, but there is no stopping The Netherlands!



EHCI 2014 total scores



What can Europe learn from The Netherlands?

- ☺ **"Chaos" systems, where patients can choose where to seek care, do better than "planned" systems;**
- ☺ **but "chaos" needs to be managed, and the NL does that very well!**
- ☺ **Choice and competition! (and remember that this has to have a "grandfather" function managing the system!)**



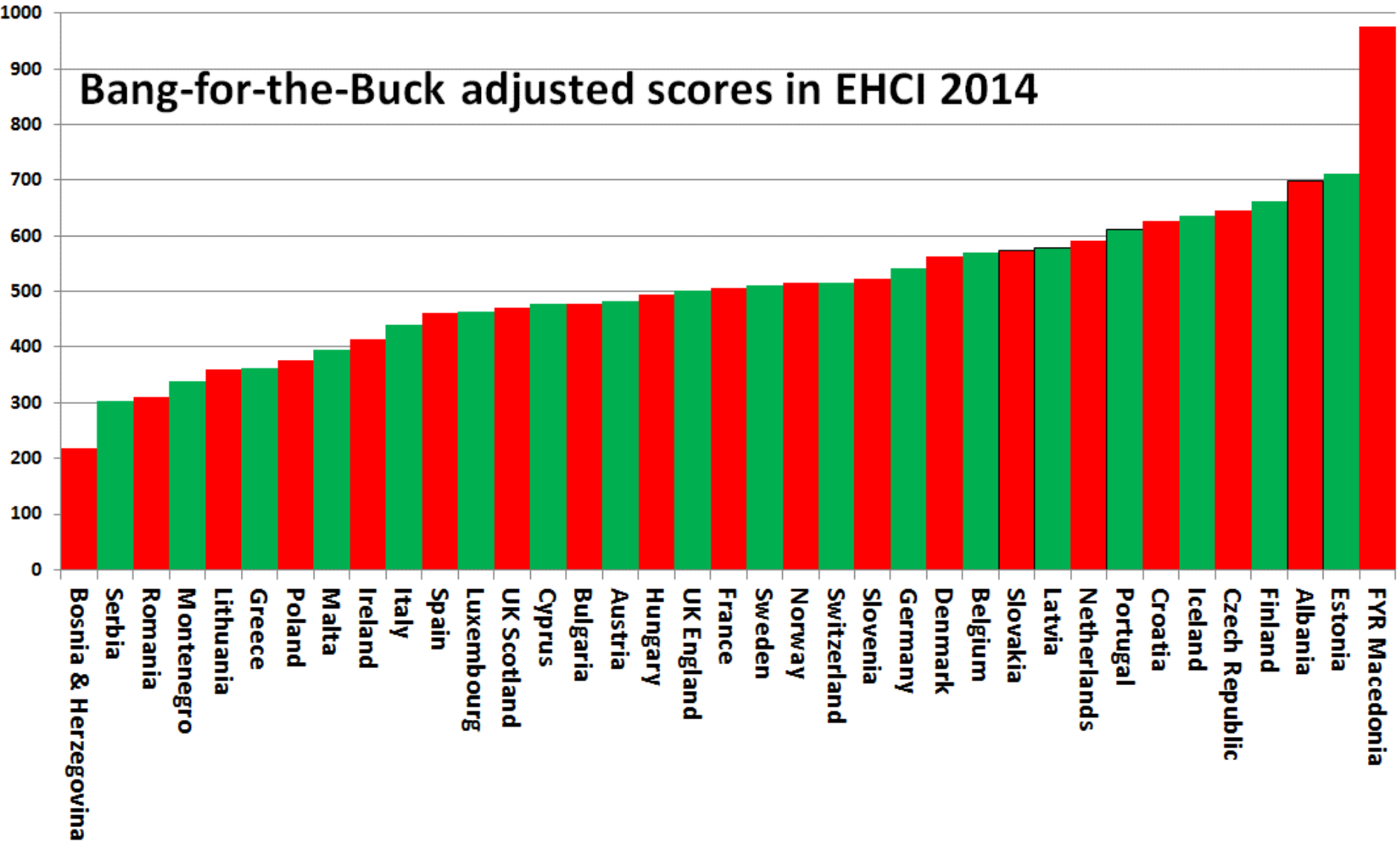
So what could be the improvement potential for the European Champions?

Sub-discipline	Albania	Austria	Belgium	Bosnia Herzegovina	Bulgaria	Croatia	Cyprus	Czech Republic	Denmark	Estonia	Finland	France	FYR Macedonia	Germany	Greece	Hungary	Iceland	Ireland	Italy	Latvia	Lithuania	Luxembourg	Malta	Montenegro	Netherlands	Norway	Poland	Portugal	Romania	Serbia	Slovakia	Slovenia	Spain	Sweden	Switzerland	UK England	UK Scotland
1. Patient rights and information	92	125	100	54	79	104	83	100	142	121	133	117	138	121	58	96	138	83	104	113	104	108	88	71	146	142	96	133	83	83	113	96	96	117	117	129	108
2. Accessibility	200	200	225	75	163	163	150	175	200	150	175	175	213	188	138	163	163	88	138	150	100	188	125	113	188	138	100	163	100	113	175	113	100	88	225	100	125
3. Outcomes	104	177	198	115	125	156	177	177	198	177	219	198	104	229	156	115	229	198	167	125	125	219	115	125	240	240	104	188	83	83	135	198	188	219	229	177	177
4. Range and reach of services	50	119	138	69	56	100	75	119	131	119	138	113	94	94	69	88	125	100	88	81	81	131	113	56	150	144	88	94	63	69	88	106	113	150	113	131	125
5. Prevention	65	83	83	60	71	60	71	71	89	54	95	89	95	95	83	83	107	89	95	71	48	101	95	65	89	107	71	83	71	77	83	89	107	107	95	95	89
6. Pharmaceuticals	33	76	76	48	52	57	62	71	76	57	86	71	57	86	57	57	57	86	57	52	52	67	48	33	86	81	52	62	52	48	71	67	67	81	76	86	86
Total score	545	780	820	420	547	640	619	714	836	677	846	763	700	812	561	601	818	644	648	593	510	814	582	463	898	851	511	722	453	473	665	668	670	761	855	718	710
Rank	30	10	6	36	29	23	24	15	5	17	4	11	16	9	28	25	7	22	21	26	32	8	27	34	1	3	31	13	35	33	20	19	18	12	2	14	16

The Netherlands top 4 sub-disciplines; some potential for improvement on Accessibility, but no country ever did that before!



Bang-for-the-Buck adjusted scores in EHCI 2014

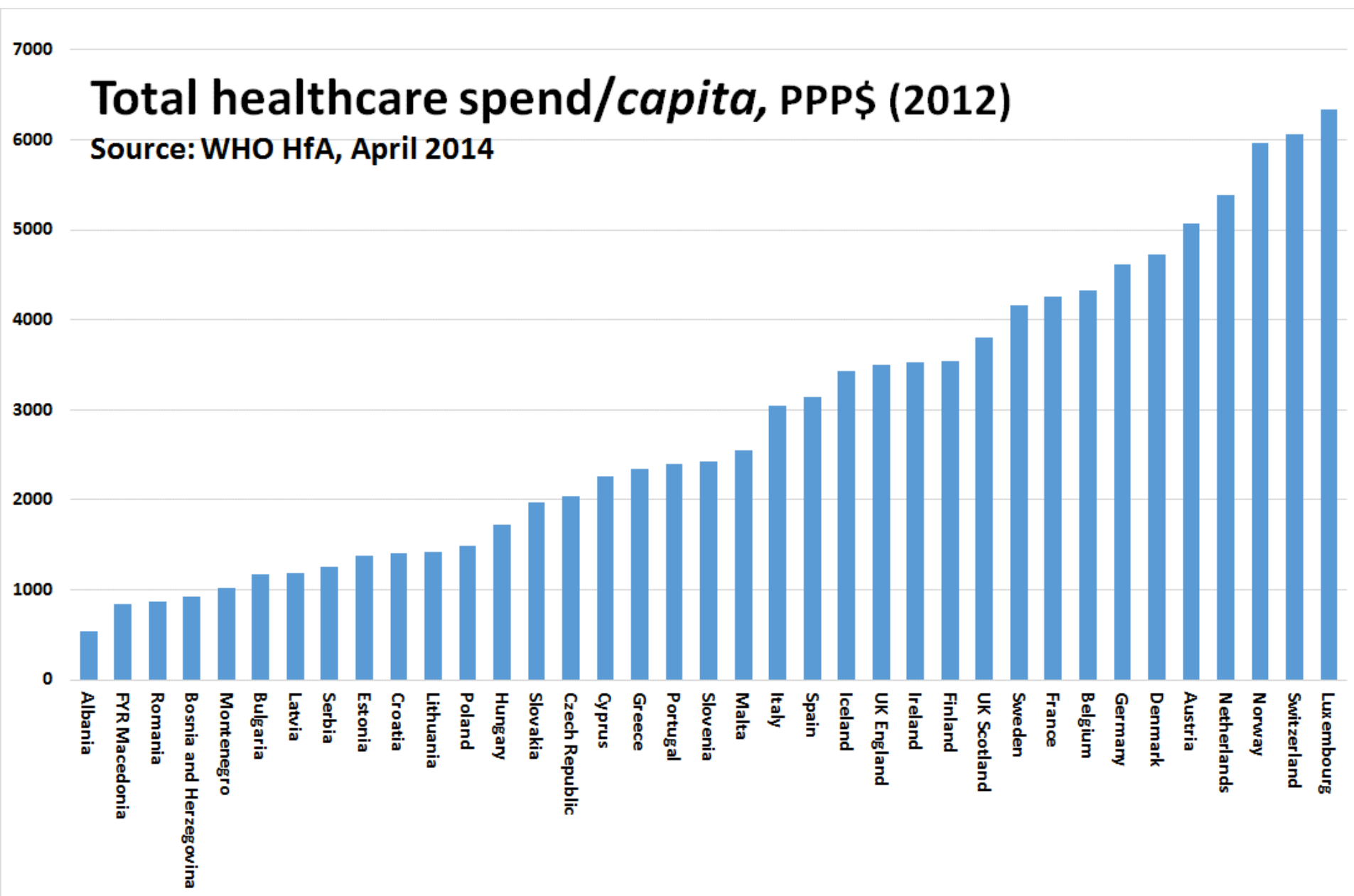


Estonia, Finland, Czech Republic, Iceland, Croatia seem to give good value for money in healthcare!



Total healthcare spend/capita, PPP\$ (2012)

Source: WHO HfA, April 2014

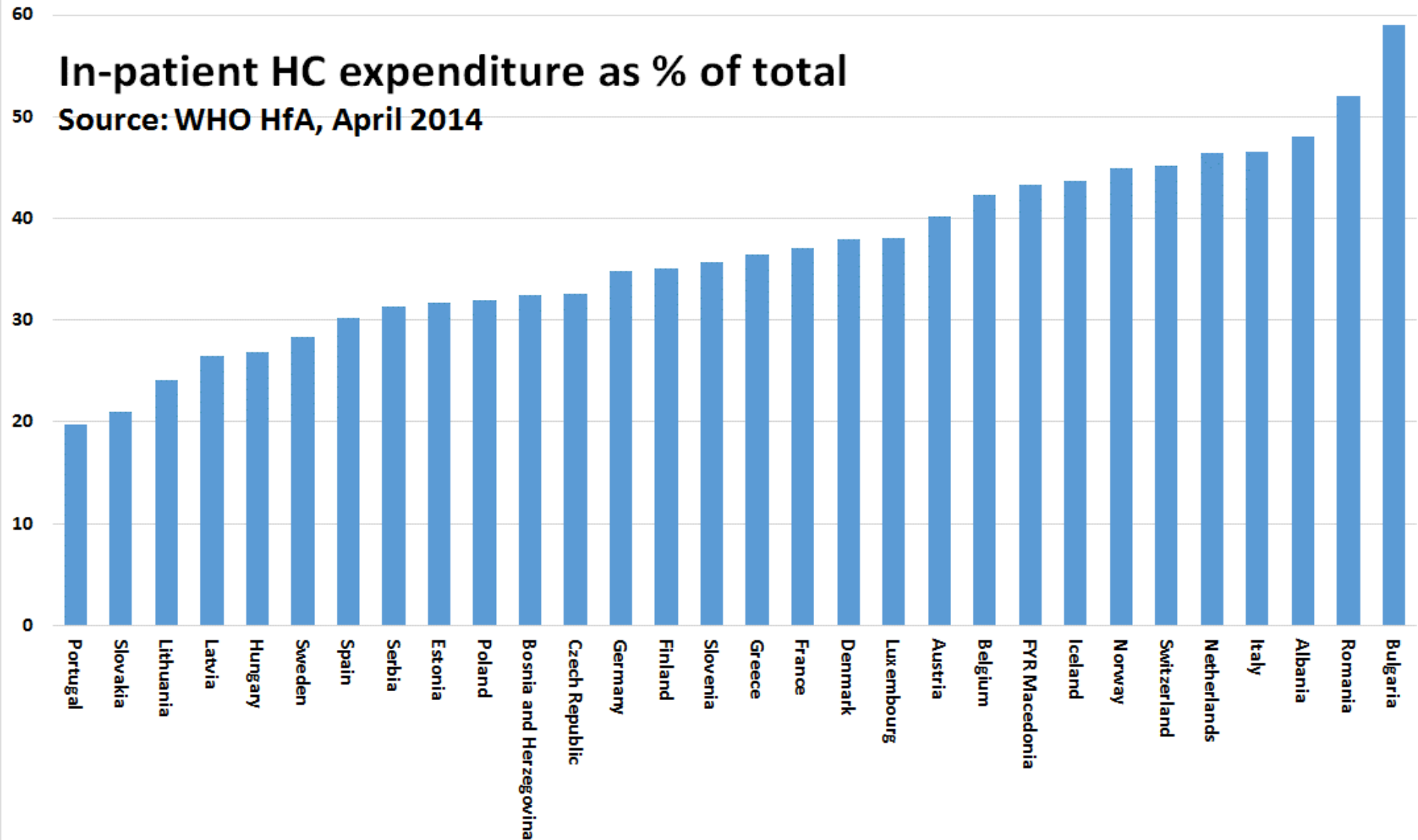


GP gatekeeping does *not* contain costs!

"Structural Antiquity" Index for healthcare systems

In-patient HC expenditure as % of total

Source: WHO HfA, April 2014



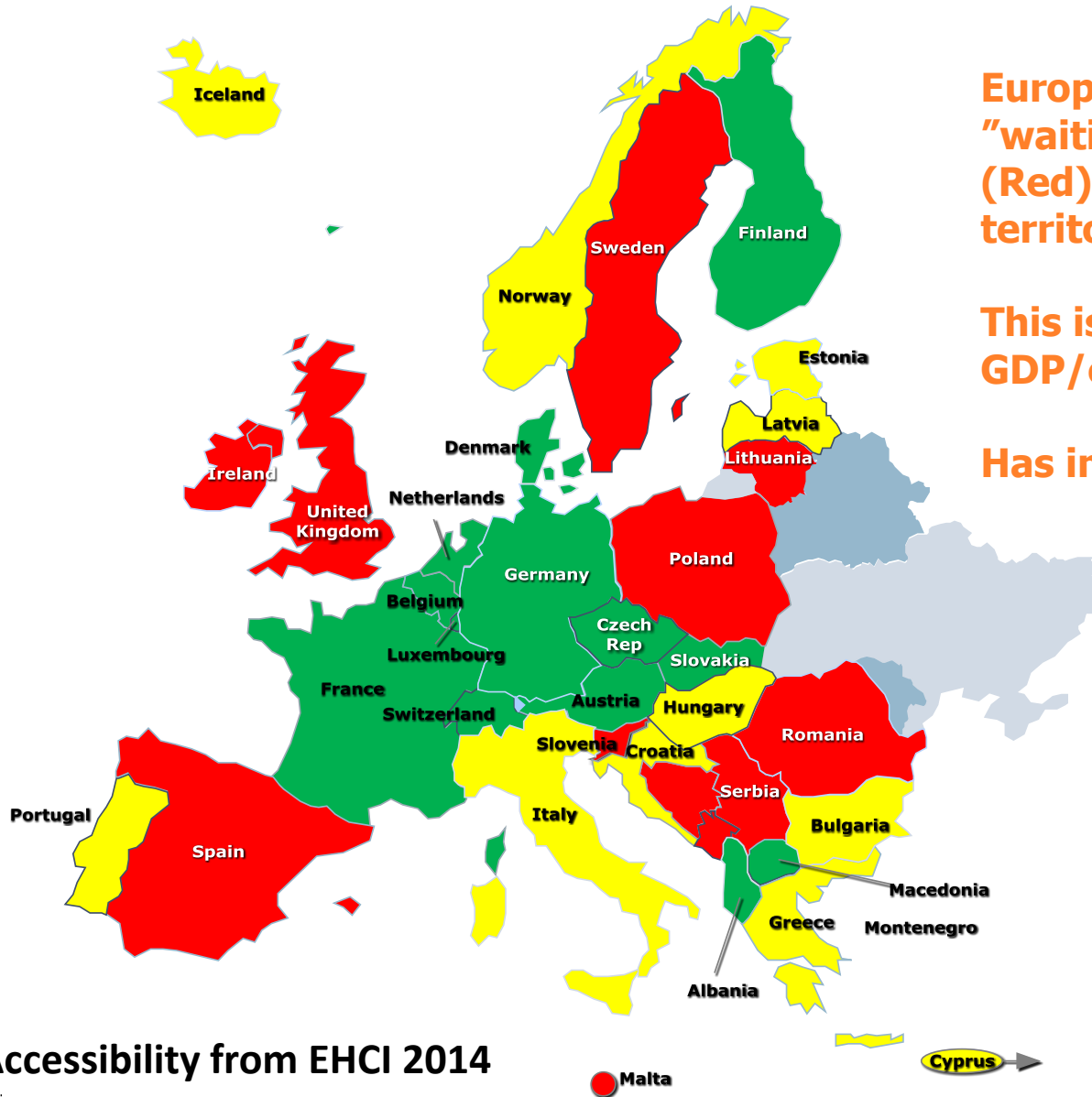
Savings potential if Dutch healthcare would approach the in/out-patient mix of Sweden

☺ **EUR 8 *billion/year?***

☺ ***i.e.;* the high Dutch costs are more due to how healthcare is operated – not due to a payment or administrative “model”**



Accessibility of European healthcare



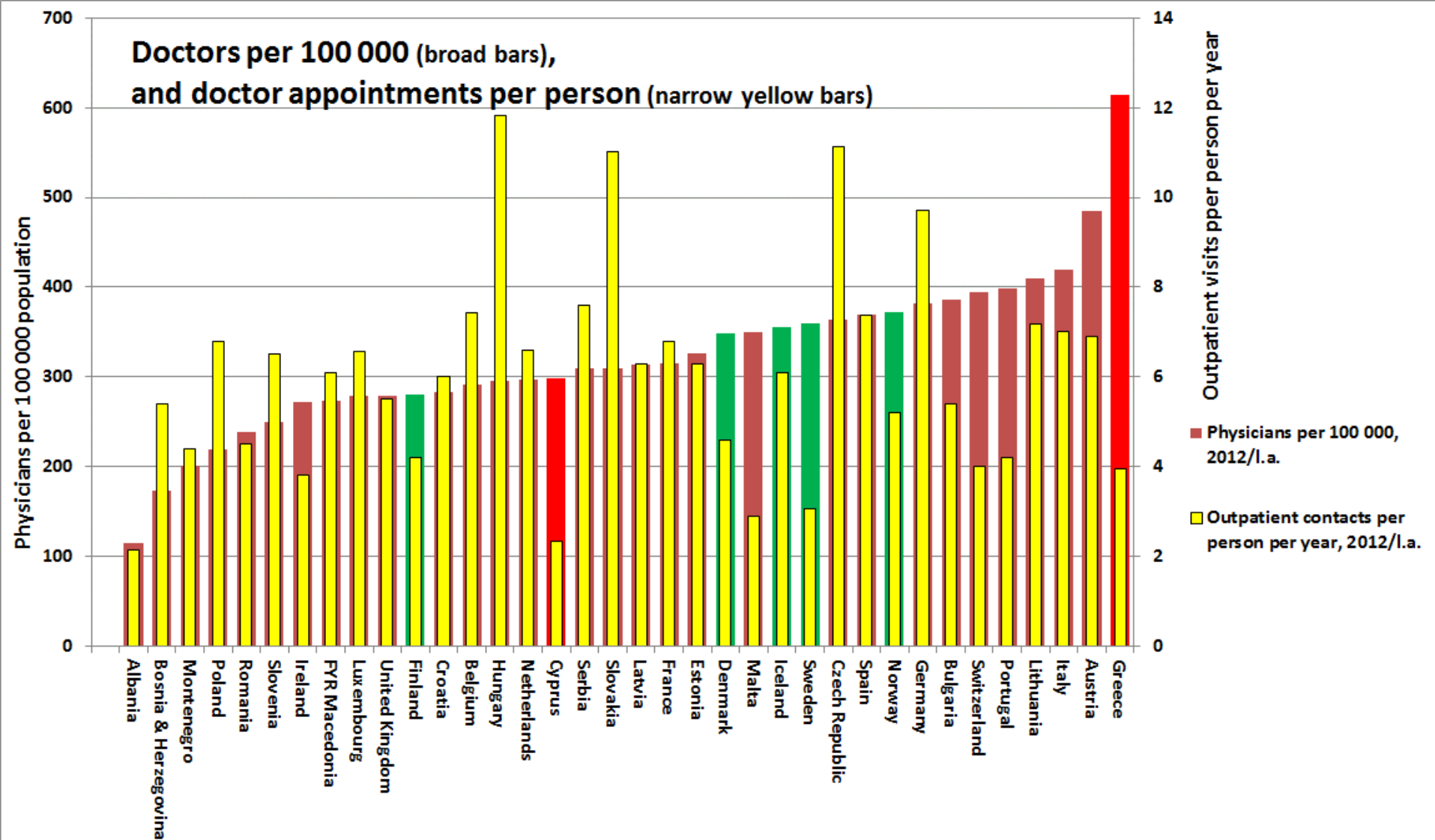
Europe is divided into "waiting list territory" (Red) and "non-waiting list territory" (Green).

This is independent of GDP/capita.

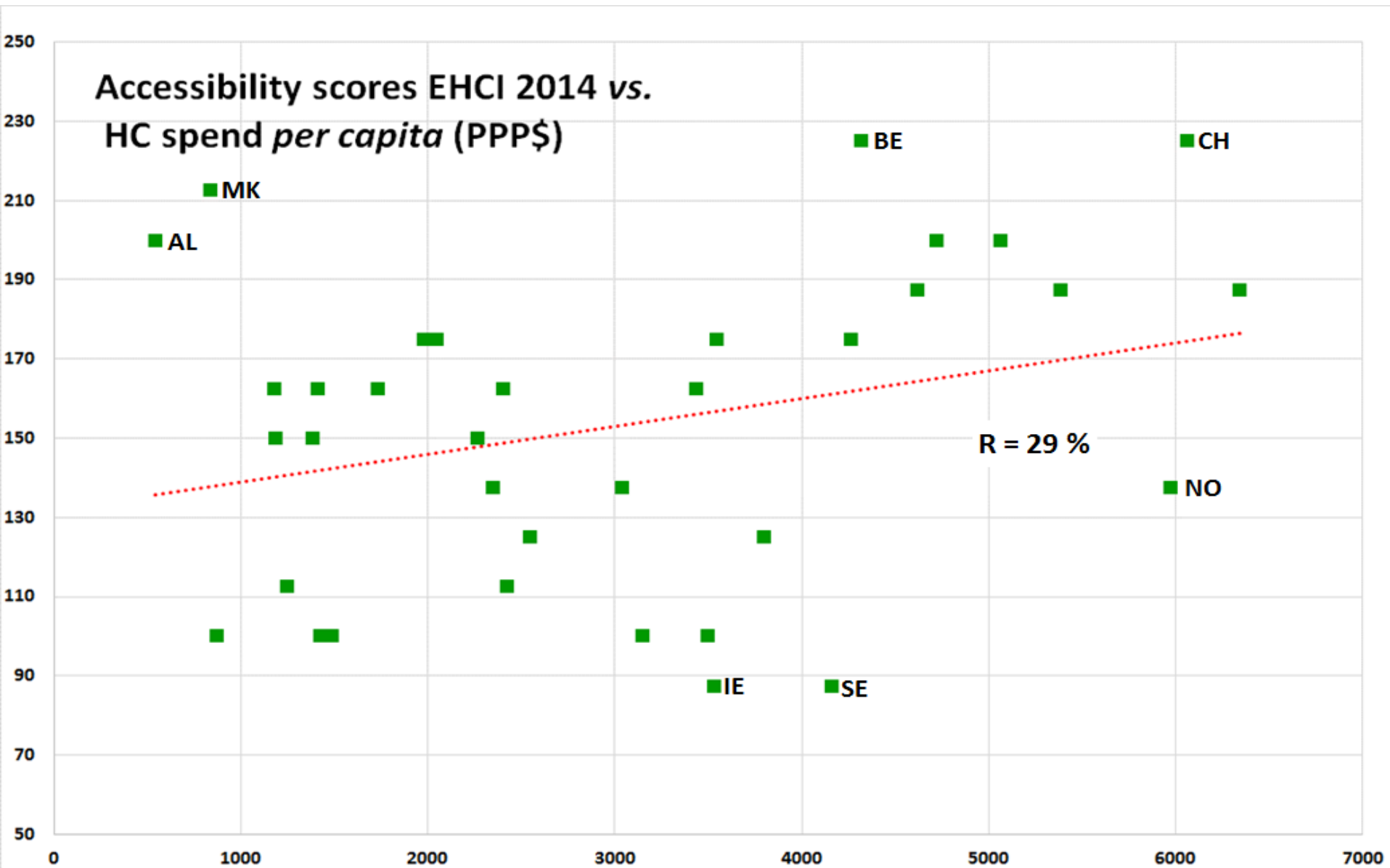
Has improved since 2013!

Accessibility from EHCI 2014

Accessibility not really related to number of doctors!

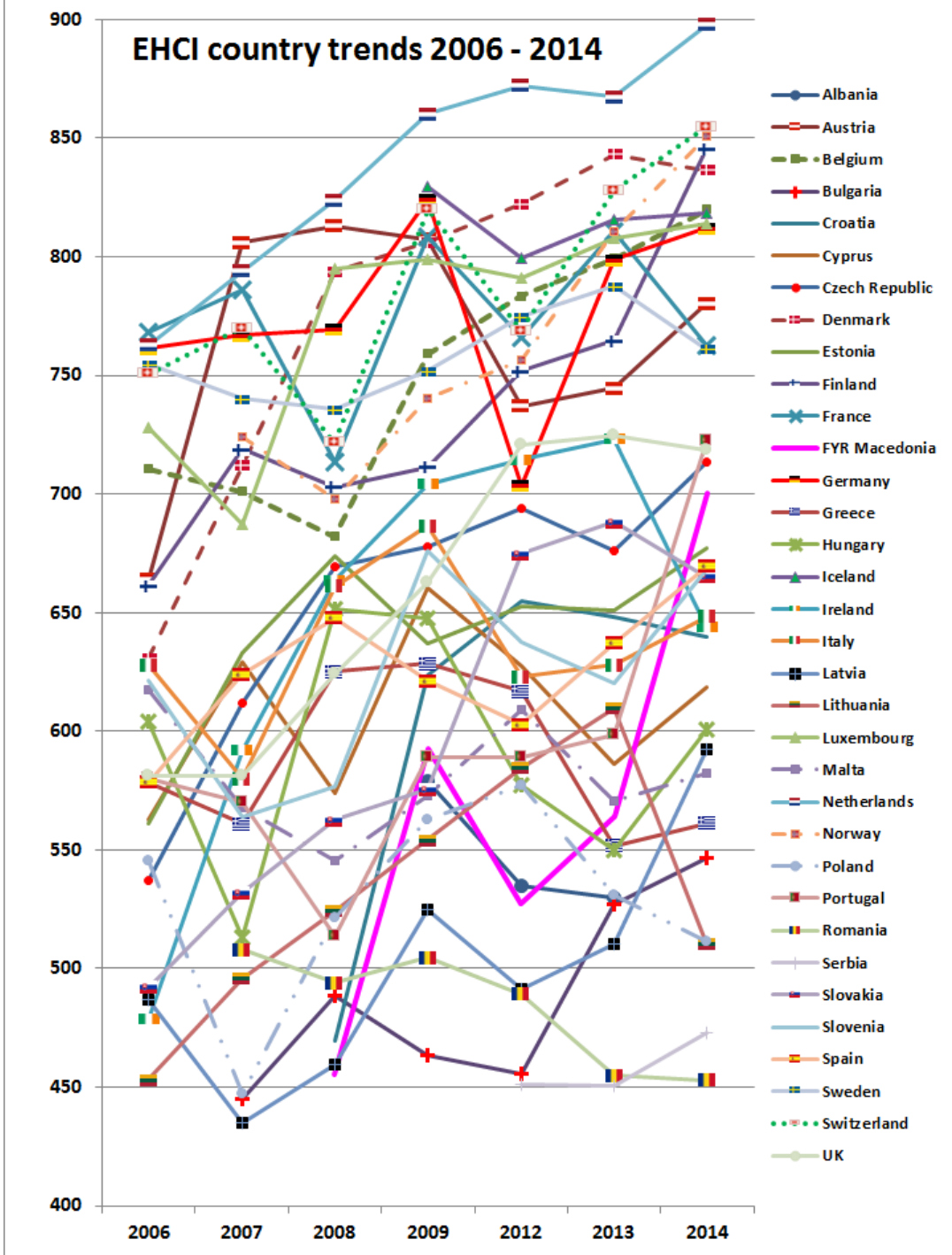


Money does not necessarily buy better access to healthcare!



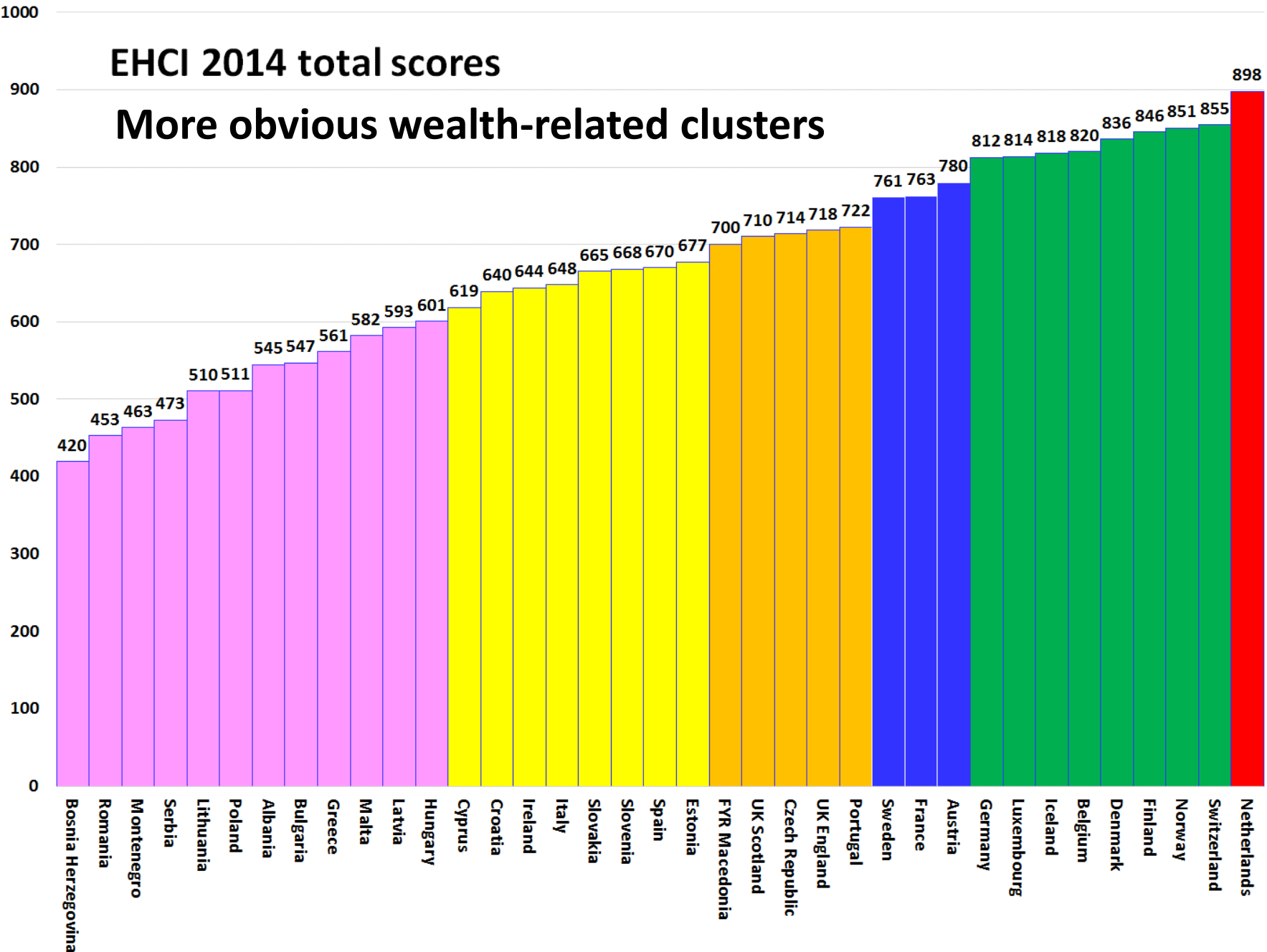
If you spend enough time looking at this graph, you will discover that particularly countries in the top keep improving.

Inequity seems to be increasing in Europe after the financial crisis!



EHCI 2014 total scores

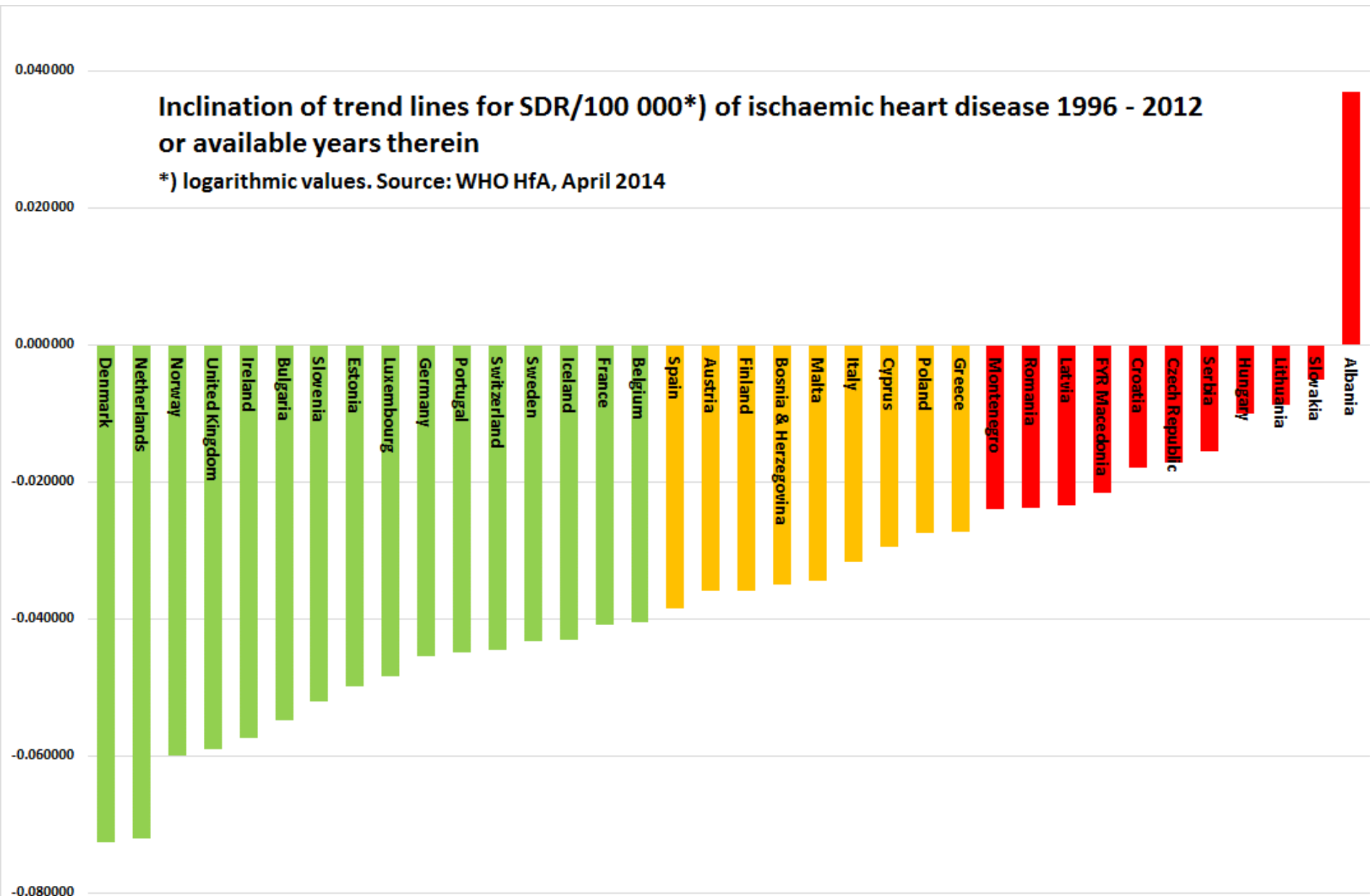
More obvious wealth-related clusters



Treatment results keep improving!

Inclination of trend lines for SDR/100 000*) of ischaemic heart disease 1996 - 2012
or available years therein

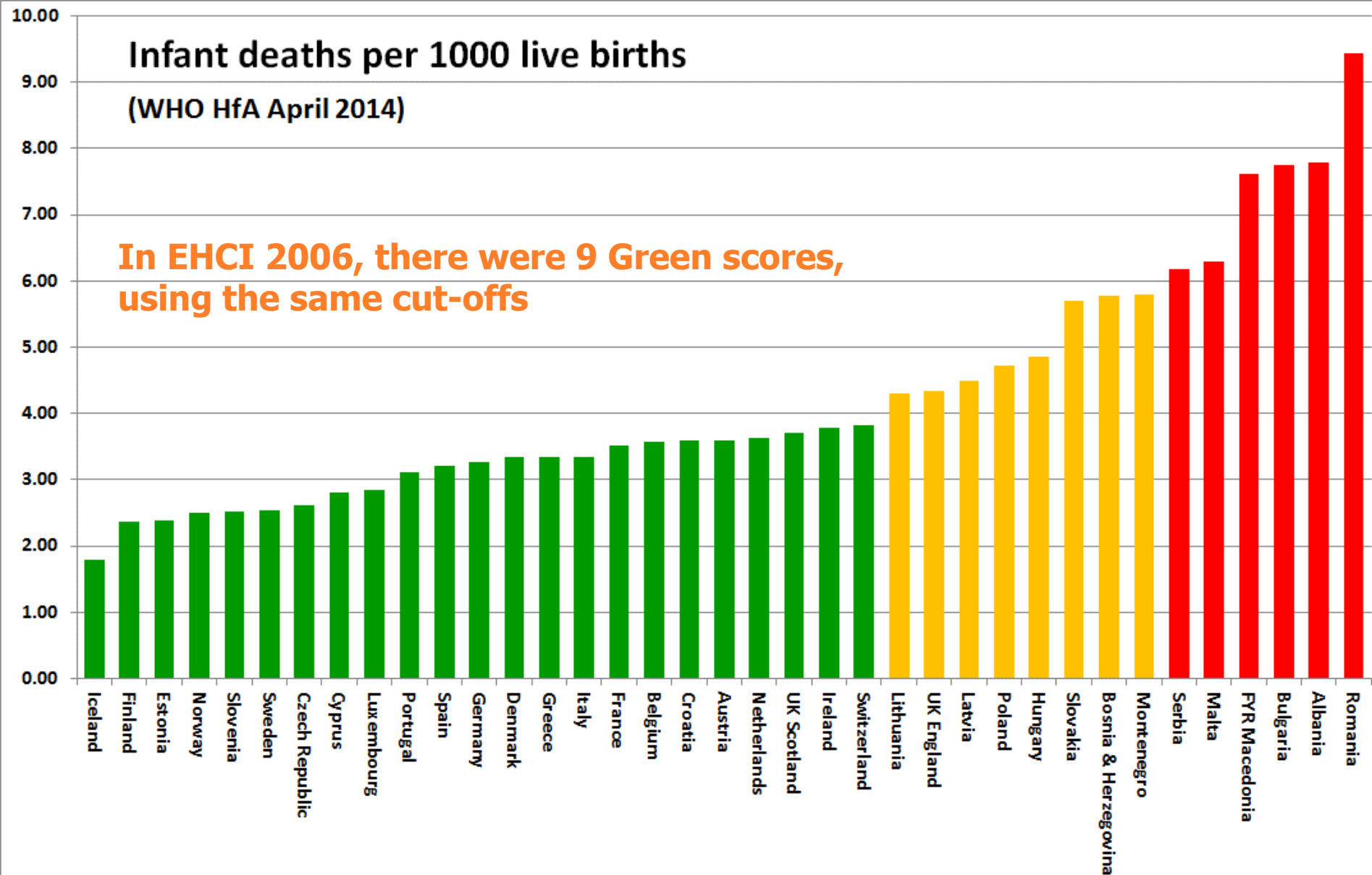
*) logarithmic values. Source: WHO HfA, April 2014



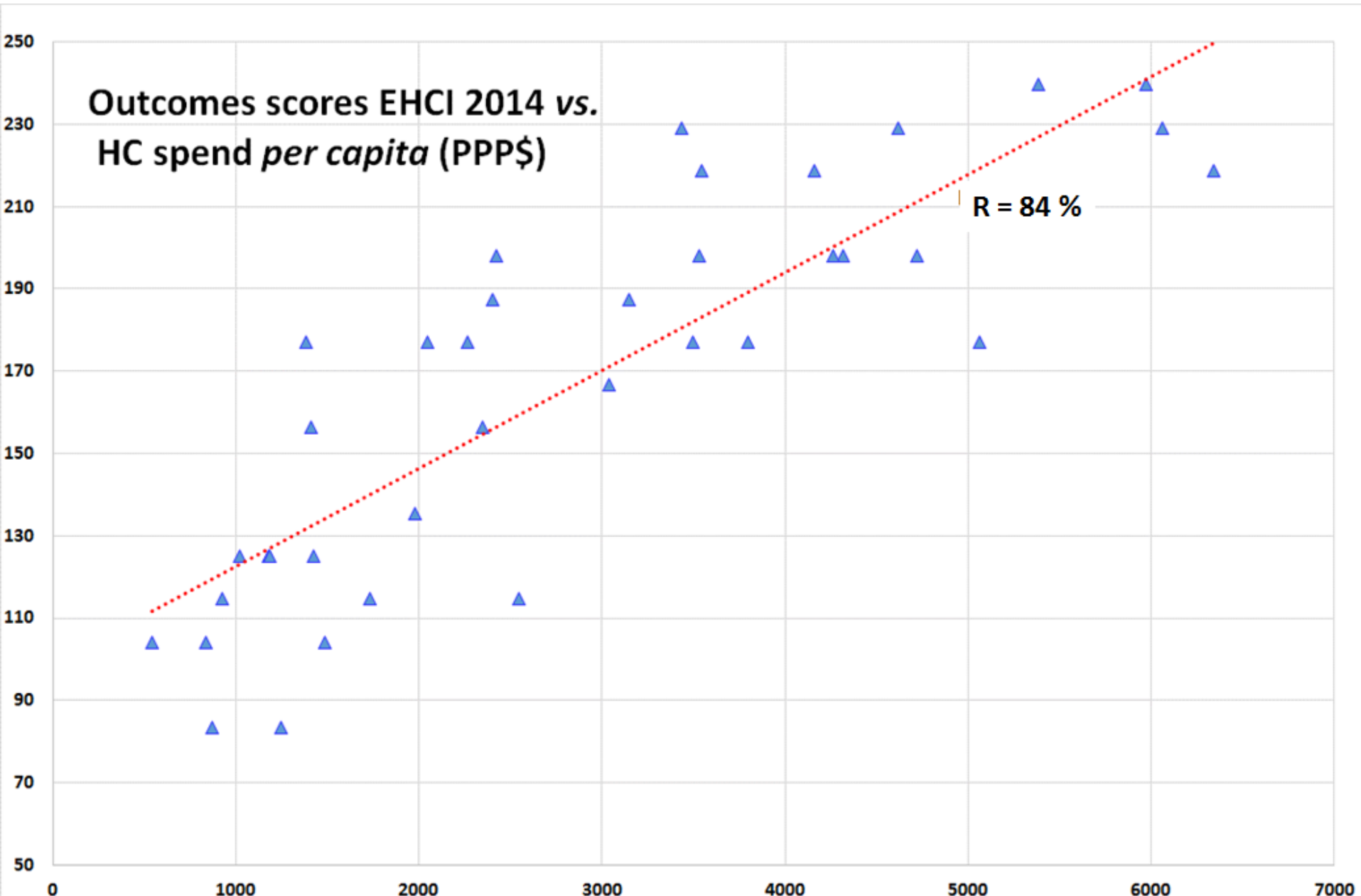
Treatment results keep improving!

Infant deaths per 1000 live births
(WHO HfA April 2014)

In EHCI 2006, there were 9 Green scores,
using the same cut-offs



Money does buy better Treatment Results



And yes; wealthy countries have better Outcomes – but not all!

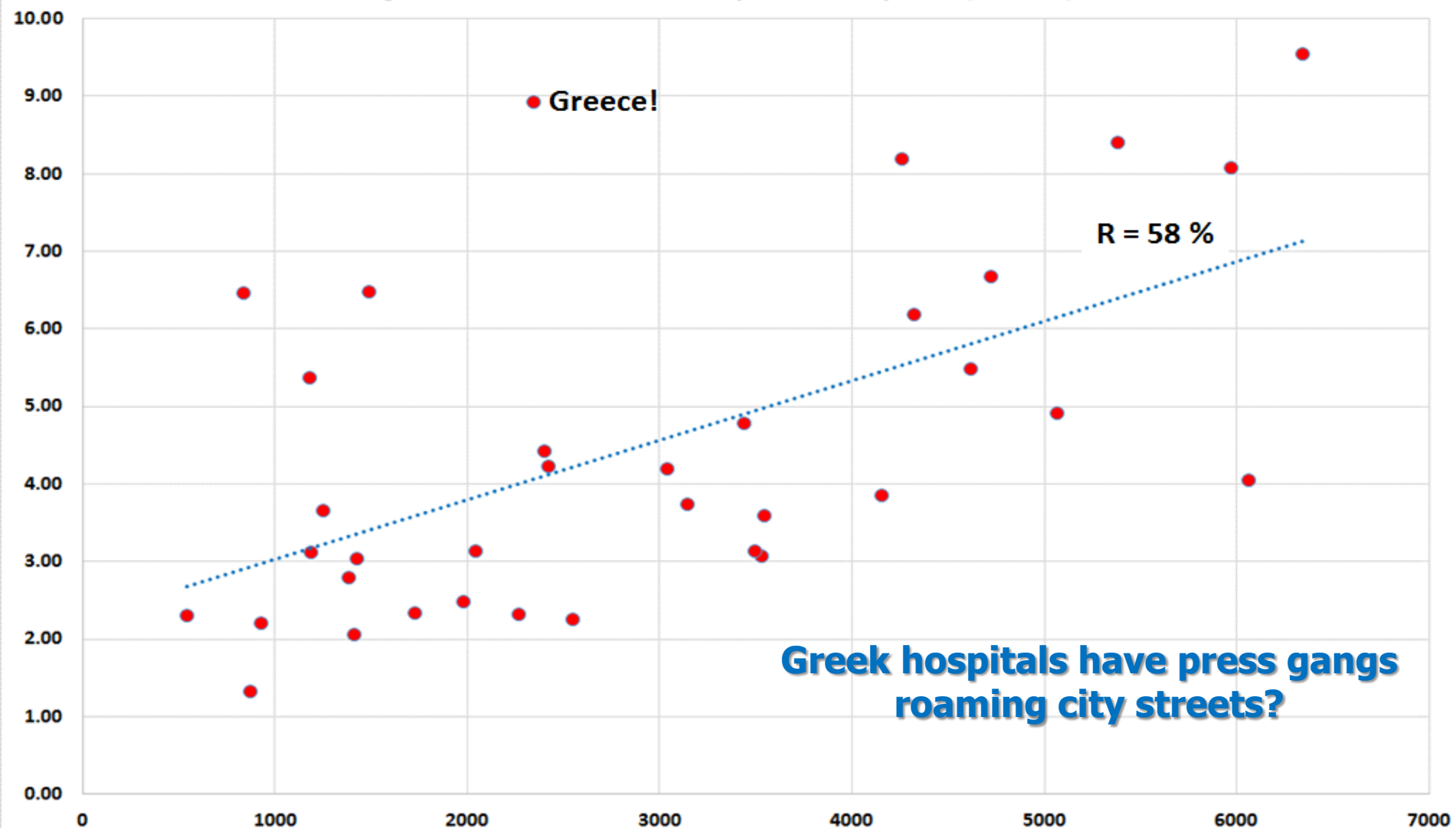
Outcomes scores in EHCI 2014



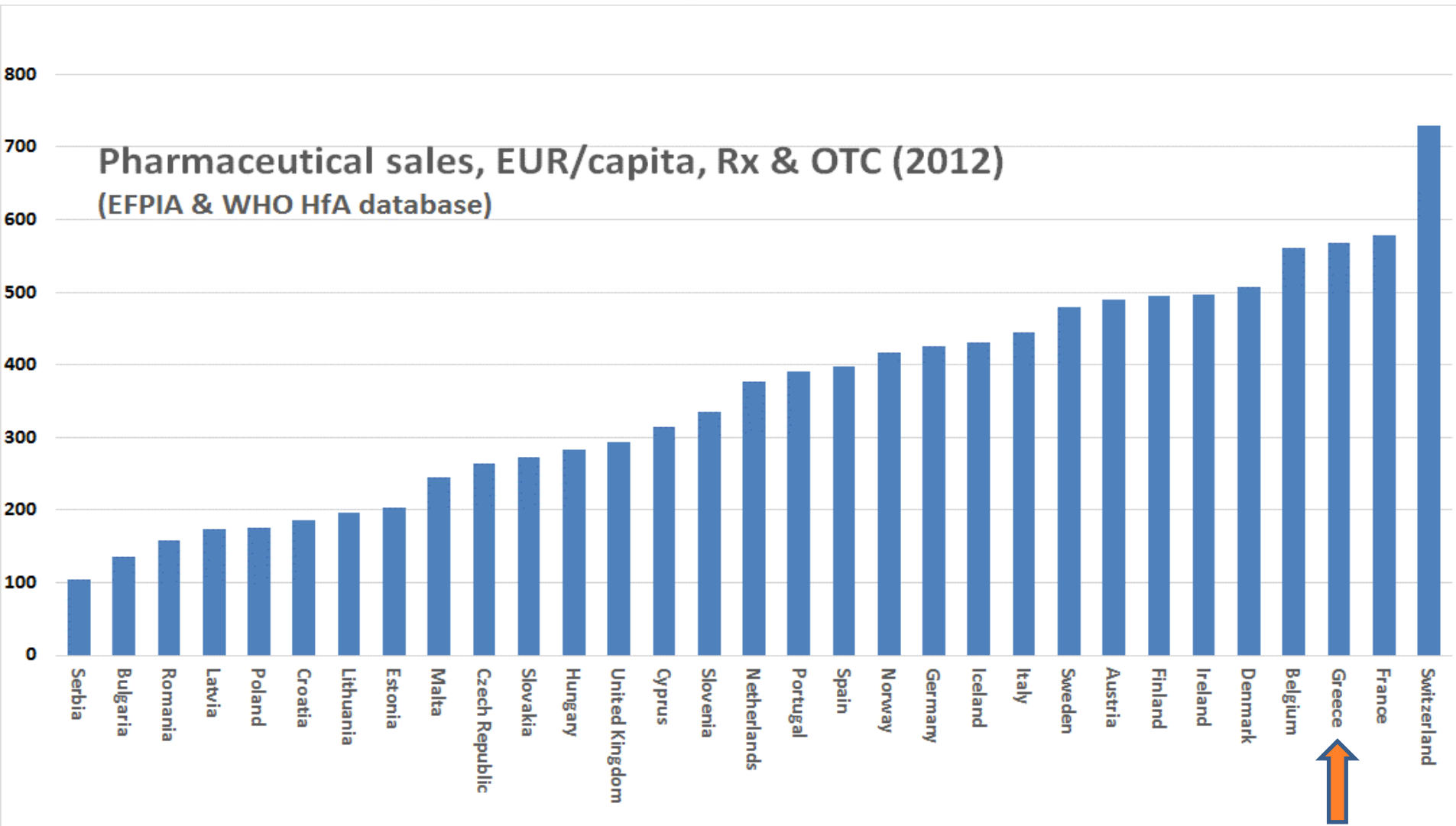
**"Big Beveridge"
(ES, IT, UK) not quite making it!**

**An example of a LAP Indicator; "Level of Attention to the Problem".
Wealthy countries can afford admitting patients on weaker indications,
but there are deviations!**

Ratio of discharges/deaths vs. HC spend/capita (PPP\$)



Greeks can somehow carry on spending on drugs and hospital admissions

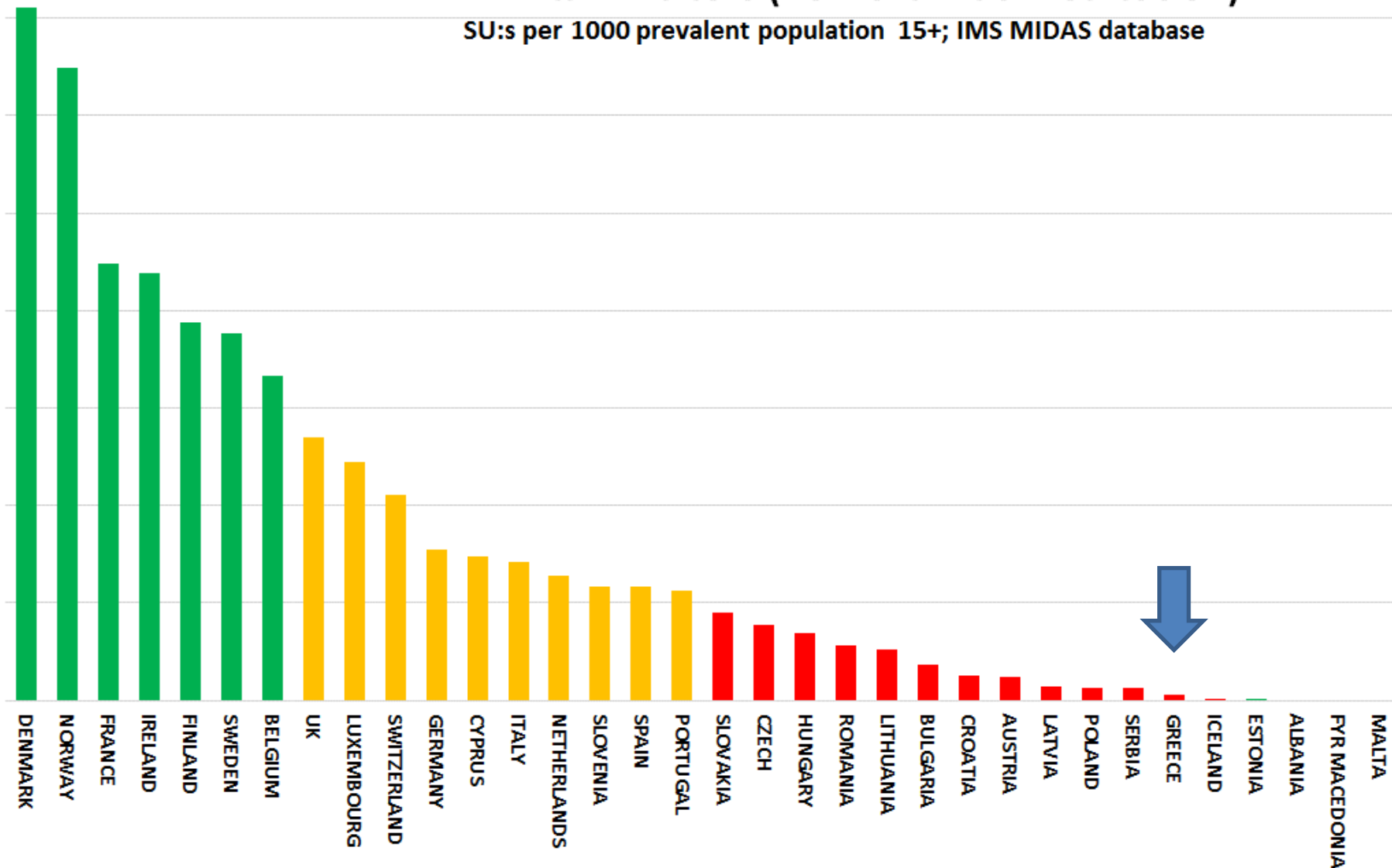


There is no evidence which supports that public health benefits from dispensing drugs to deceased patients

Restrictivity with new drugs

TNF- α inhibitors (new arthritis medication)

SU:s per 1000 prevalent population 15+; IMS MIDAS database



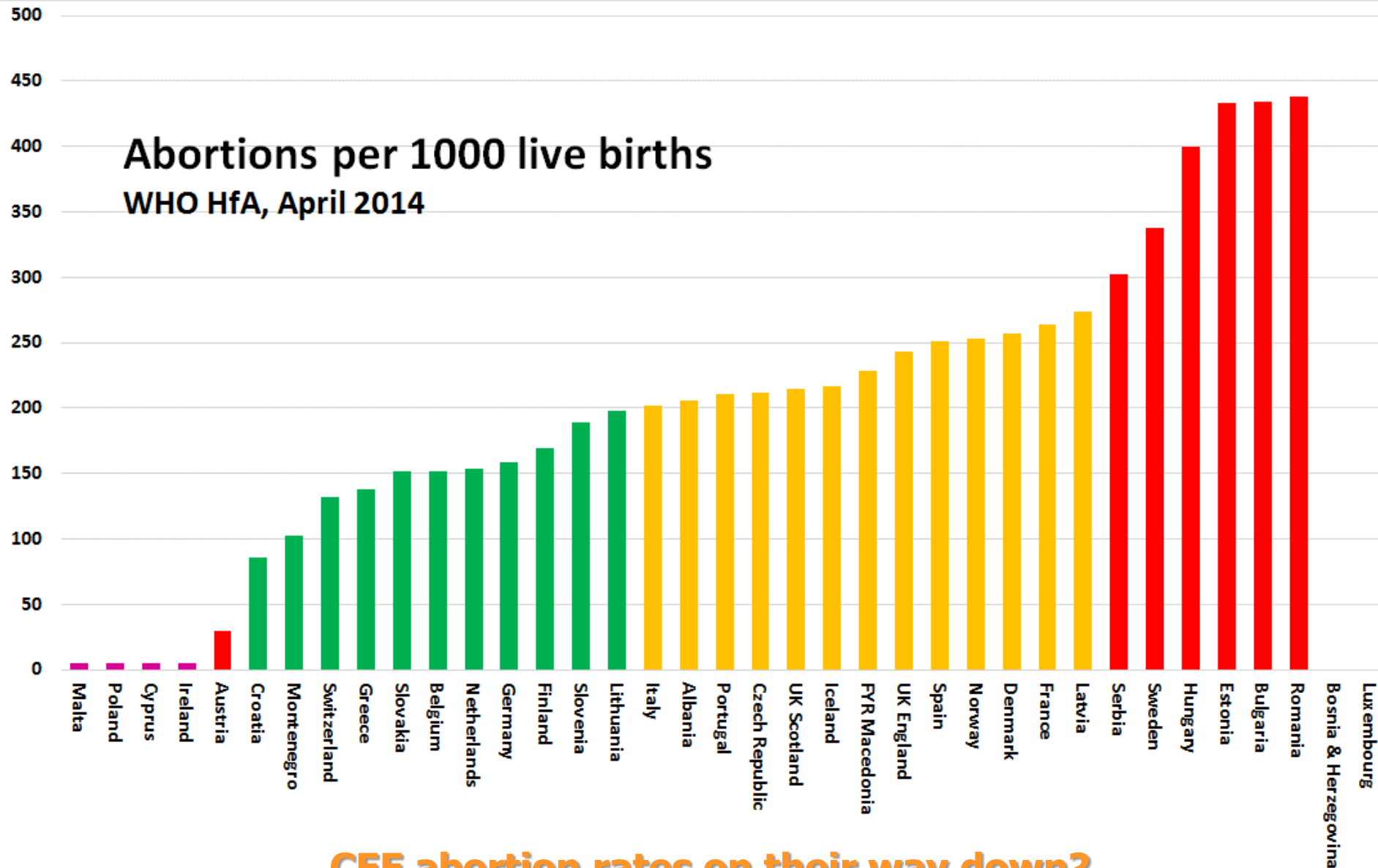
England and Scotland have separate National Health Services!!!

- ☺ **Scotland has 10 % higher healthcare spend *per capita***
- ☺ **Could be fair; the public health situation is more troublesome in Scotland**
- ☺ **But the two systems are basically the same, when measured on a scale intended for 36 European countries!**
- ☺ **Scotland 710 – England 718!**
- ☺ **Scotland sadly not providing the open hospital results data of NHS Choices**
- ☺ **There is scant evidence for having separate sets of administrators making a difference *at all* for anything!**



Women should have the right to abortion, but abortion as a contraceptive is not a good idea!

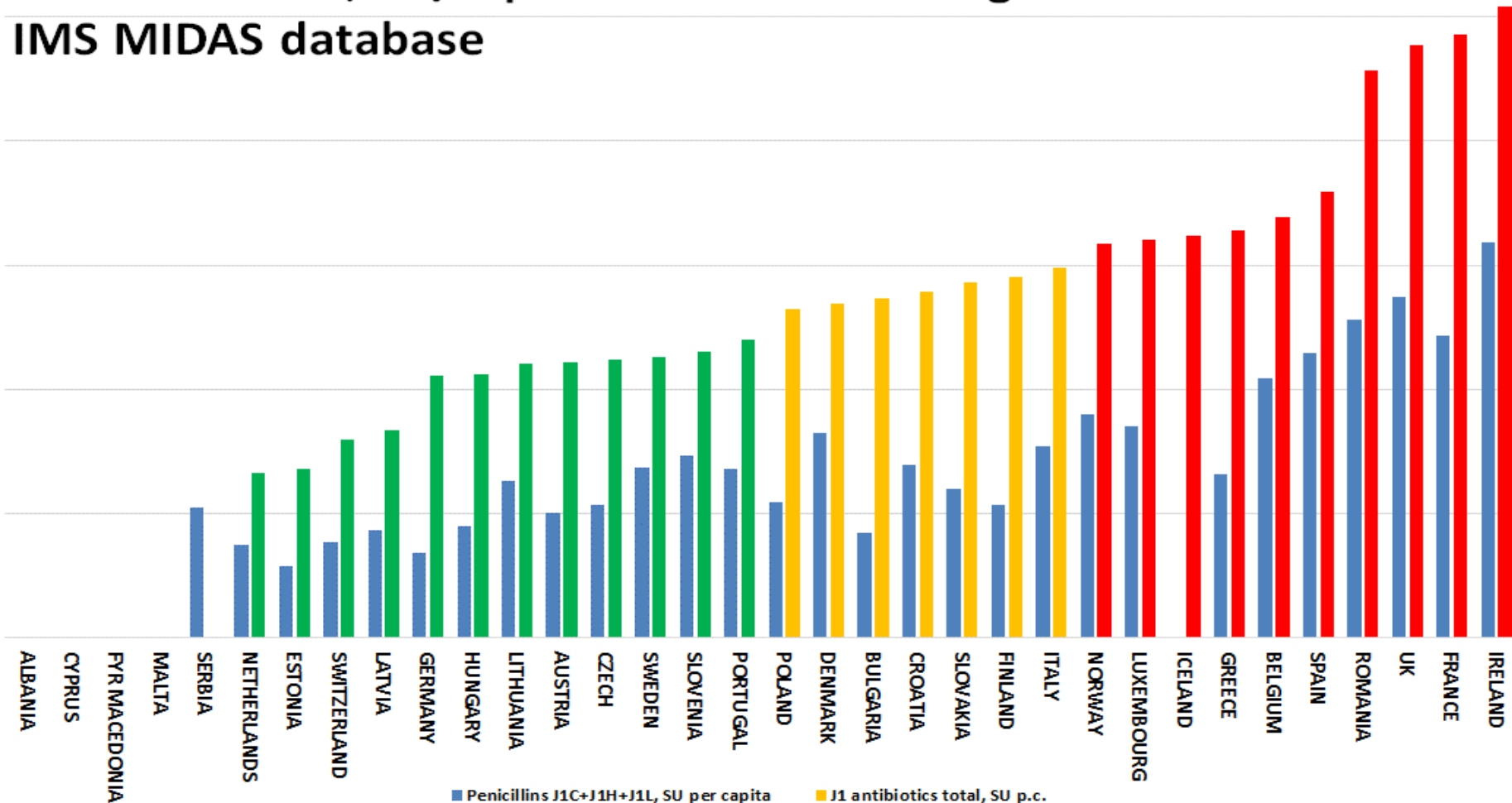
Abortions per 1000 live births
WHO HfA, April 2014



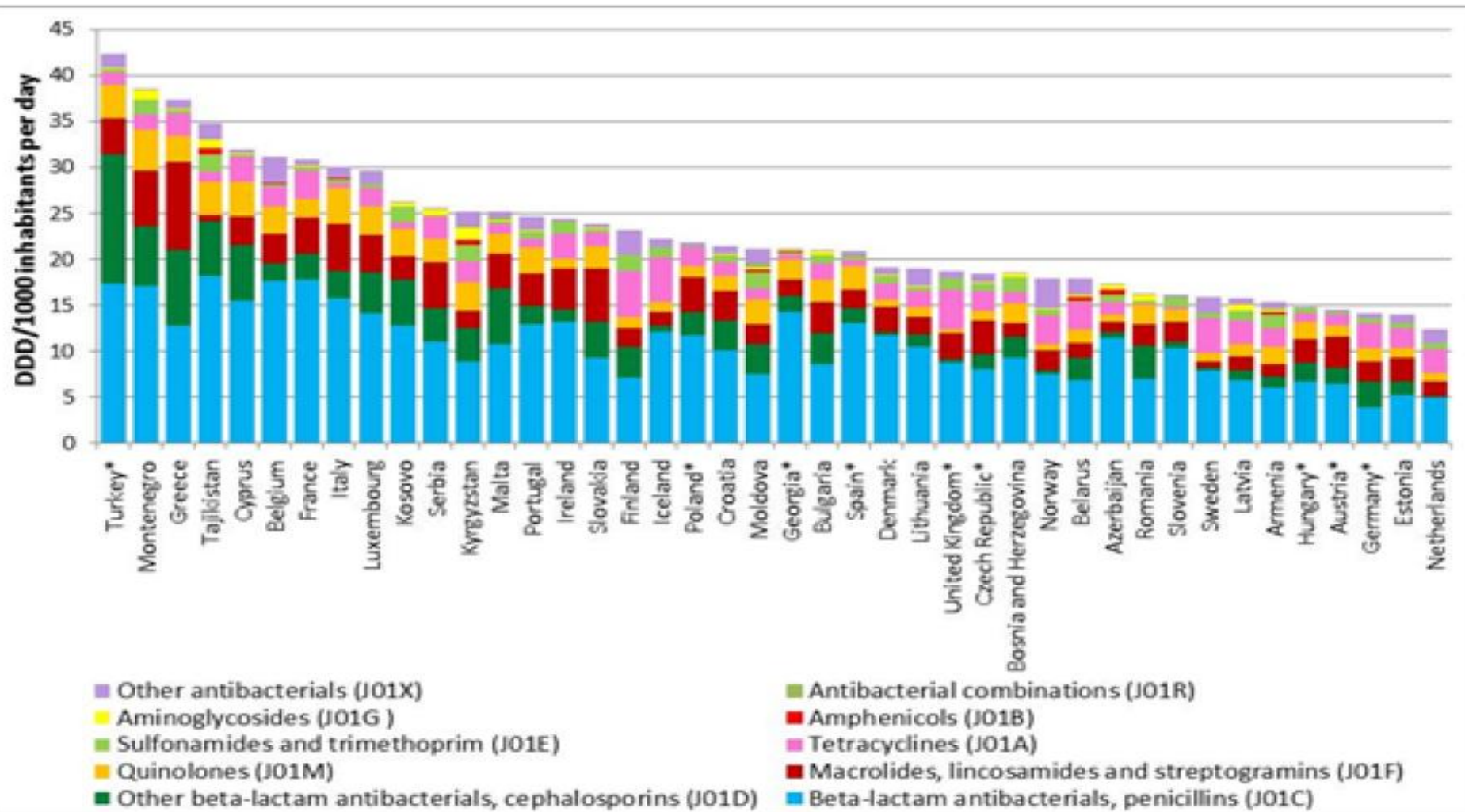
CEE abortion rates on their way down?

The 2013 indicator on use of antibiotics

Antibiotics use, SU/capita 12 months ending June 2013
IMS MIDAS database



The 2014 indicator on use of antibiotics – who do we trust?



Total antibiotic use in 2011, expressed in number of DDD per 1000 inhabitants per day in 12 European countries and Kosovo as compared to 29 ESAC-Net countries.

"Bismarck Beats Beveridge"

- ☺ **Bismarck systems dominate the top of EHCI ranking**
 - ☺ **Beveridge systems offer conflicts between loyalty to citizens and loyalty to healthcare system/organisation ("politician home town job preservation")**
 - ☺ **lack of business acumen in Beveridge systems; efficiency gains and cutbacks frequently not differentiated!**
 - ☺ **small Beveridge systems (the Nordic countries) can compete**



- ☺ **"Chaos" systems do better than centrally planned**
 - ☺ **100's of thousands of professionals take better decisions and drive development better than central bodies**
 - ☺ **incentives driving quality and productivity are essential!**



MORE SLIDES

“The verdict of the people on the medical profession. Swedes are less satisfied with attitudes and communication skills of doctors, says international comparison. Norway and Sweden bottom of 11 countries compared.” (Dagens Medicin 2012-02-29)

Fråga 1

► **Läkaren spenderar tillräcklig tid med dig**

		Andel i procent som svarade JA*
1	Schweiz	88%
2	Storbritannien	87%
3	Nya Zeeland	87%
4	Nederländerna	87%
5	Tyskland	86%
6	Australien	85%
7	Frankrike	82%
8	USA	81%
9	Kanada	77%
10	Norge	71%
11	Sverige	71%

*När tillräckligt har svarat alltid eller ofta räknas det som JA

Fråga 2

► **Läkaren uppmuntrar dig att ställa frågor**

		Andel i procent som svarade JA
1	Storbritannien	80%
2	Schweiz	79%
3	USA	75%
4	Australien	71%
5	Nya Zeeland	70%
6	Tyskland	66%
7	Kanada	62%
8	Nederländerna	59%
9	Frankrike	55%
10	Sverige	44%
11	Norge	33%

Fråga 3

► **Läkaren förklarar saker på ett lätt sätt**

		Andel i procent som svarade JA
1	Schweiz	93%
2	Frankrike	91%
3	Storbritannien	90%
4	Tyskland	90%
5	Nya Zeeland	89%
6	USA	87%
7	Australien	87%
8	Kanada	86%
9	Nederländerna	85%
10	Norge	79%
11	Sverige	79%

Fråga 4

► **Läkaren spenderar tid, uppmuntrar frågor och förklarar lätt (JA på fråga 1-3)**

		Andel i procent som svarade JA
1	Schweiz	73%
2	Storbritannien	72%
3	Australien	66%
4	Nya Zeeland	65%
5	USA	65%
6	Tyskland	61%
7	Kanada	54%
8	Nederländerna	52%
9	Frankrike	50%
10	Sverige	37%
11	Norge	27%

4 800 vuxna svenskar upp till 75 år har ingått i den svenska delen av studien. De telefonintervjuades våren 2011.

GRAFIK: ELIN BRANDER. KÄLLA: REGERINGSKANSLIET

The cherished notion that “In Sweden, we provide holistic medicine – in contrast to ‘assembly line medicine’ down on the Continent ” lacks evidence!.



Websites with comprehensive information about all registered pharmaceuticals 2013 (OTC *and* Rx)

- ✓ Austria: www.austriacodex.at/avmain/ <http://pharmaweb.ages.at/index.jsf>
- ✓ Belgium: <http://www.bcfi.be/>, www.pharma.be
- ✓ Croatia: <http://www.almp.hr/?ln=hr&w=lijekovi>
- ✓ Czech Republic: www.zdravotnickenoviny.cz/scripts/modules/catalogue/search.php?catalogueID=2
- ✓ Denmark: <http://medicin.dk/>
- ✓ Estonia: www.raviminfo.ee
- ✓ Finland: www.fimea.fi/lakemedel/produktresumeeer/humpl
- ✓ France: www.doctissimo.fr
- ✓ Germany: www.onmeda.de
- ✓ Greece: www.galinos.gr/web/drugs/main/lists
- ✓ Hungary: www.ogyi.hu/drug_database/
- ✓ Ireland: www.medicines.ie
- ✓ Italy: www.prontuariofarmaci.com
- ✓ Latvia: <http://www.zva.gov.lv/index.php?id=375&sa=375&top=334>
- ✓ Lithuania: www.vaistai.lt
- ✓ Malta: <http://medicinesauthority.gov.mt/products/search.htm>
- ✓ Netherlands: www.cbg-meb.nl/CBG/en/human-medicines/geneesmiddeleninformatiebank/default.htm
- ✓ Norway: www.legemiddelverket.no/custom/Preparatsok/prepSearch_80333.aspx?filterBy=CopyToConsumer
- ✓ Portugal: www.infarmed.pt/infomed/inicio.php
- ✓ Romania: www.anm.ro/en/html/pharmacopoeia.html
- ✓ Slovakia: www.liekinfo.sk
- ✓ Slovenia: www.zdravila.net
- ✓ Sweden: www.fass.se
- ✓ Switzerland: www.kompendium.ch
- ✓ U.K.: <http://emc.medicines.org.uk/>



Why do we not see clearer traces of the financial crisis?

- ☺ **Healthcare traditionally weak at measuring output/outcomes.**
- ☺ **“The good old days that never were”**
- ☺ **Underlying improvement forces are very strong!**



THANK YOU -

SEE IT ALL ON

www.healthpowerhouse.com



"What is the secret behind the rapid improvement of Macedonian healthcare performance?"

Nicola Todorov

**Minister of Health,
Republic of Macedonia**